

# MB 700T00: Microsoft Dynamics 365 Finance and Operations Apps Solution Architect



**Days:** 5

**Prerequisites:** Students should have previous experience with functional or technical focus in Dynamics 365: Finance and Operations Applications.

**Audience:** This course is for anyone aspiring to a solution architect role.

**Description:** The Dynamics 365 Finance and Operations solution architect is a trusted advisor who consults with organizations and implementation team members to refine business needs into a well-defined and cost-effective solution. The architect is accountable for the integrity and successful delivery of the complete solution design. The architect provides critical guidance and support from pre-sales throughout the remainder of the project lifecycle. They have a broad knowledge base and experience designing solutions that meet business needs. The solution architect may have a technical, functional, or industry background. The solution architect must demonstrate knowledge of all Dynamics 365 apps and Power Platform. They must have a deep understanding of Finance and Operations apps. In addition, they have extensive domain knowledge in one or more industry verticals. This course is designed to prepare those who aspire to be solution architects, as well as new solution architects, to learn more about the technical information they will encounter during implementation.

## **Course Objectives:**

This workshop teaches students how to:

- Understand the role and responsibilities of a Dynamics 365 Finance & Operations Solution Architect.
- Translate business requirements into a complete, scalable, and supportable solution design.
- Determine the appropriate deployment model, environment strategy, and system architecture.
- Create a solution blueprint that incorporates business processes, integrations, data migration, and security.
- Evaluate and design extensibility solutions within Dynamics 365 FO.
- Plan for integrations using both Microsoft and third-party tools.
- Define a data management and migration strategy that aligns with organizational goals.
- Establish a robust testing strategy, including automated testing with RSAT.
- Assess security, compliance, performance, and monitoring requirements.
- Guide customers through go-live readiness, cut-over planning, and post-go-live support.
- Effectively manage the implementation lifecycle and interactions with FastTrack.

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## OUTLINE:

### LESSON 1: ARCHITECT SOLUTIONS FOR DYNAMICS 365 AND MICROSOFT POWER PLATFORM

- Becoming a solution architect for Dynamics 365 and Microsoft Power Platform
- Discover customer needs as a Solution Architect for Dynamics 365 and Microsoft Power Platform
- Propose a solution as a Solution Architect for Microsoft Power Platform and Dynamics 365

### LESSON 2: USE LIFECYCLE SERVICES TO DESIGN AND PLAN AN IMPLEMENTATION OF FINANCE AND OPERATIONS APPS

- Work with requirements for Microsoft Power Platform and Dynamics 365
- Perform fit-gap analysis
- Plan architecture using Lifecycle Services (LCS)
- Create a solution blueprint using LCS tools

### LESSON 3: MIGRATE DATA AND GO LIVE WITH FINANCE AND OPERATIONS APPS

- Prepare data for migration to Finance and Operations apps
- Work with the Data Management Framework (DMF)
- Plan and test data migration strategies
- Prepare a cut-over and go-live checklist
- Support go-live readiness and post-go-live tasks

### LESSON 4: IMPLEMENT FINANCE AND OPERATIONS APPS

- Develop an environment and instance strategy
- Plan and manage application lifecycle management (ALM)
- Design security architecture for Finance and Operations apps
- Plan integrations and business events

- Monitor performance and optimize system health

### LESSON 5: USE SUCCESS BY DESIGN FOR DYNAMICS 365 SOLUTIONS

- Introduction to Success by Design
- Solution blueprint reviews
- Data model and data migration reviews
- Security and compliance reviews
- Integration and extensibility reviews
- Go-live readiness assessments

### LESSON 6: CONFIGURE APPS IN FINANCE AND OPERATIONS

- Configure finance and supply chain processes
- Set up legal entities and organizational structures
- Configure features using the Feature Management workspace
- Set up reporting and analytics (Power BI, embedded analytics)
- Configure workflows and business rules

### LESSON 7: VALIDATE YOUR SKILLS ARCHITECTING SOLUTIONS FOR CUSTOMERS AND PRODUCTS

- Scenario-based design assessments
- Solution architecture case study
- Hands-on practice evaluating requirements and proposing a solution
- Capstone challenge: architect a complete end-to-end scenario